DOCUMENT RESUME

ED 337 876 EA 023 402

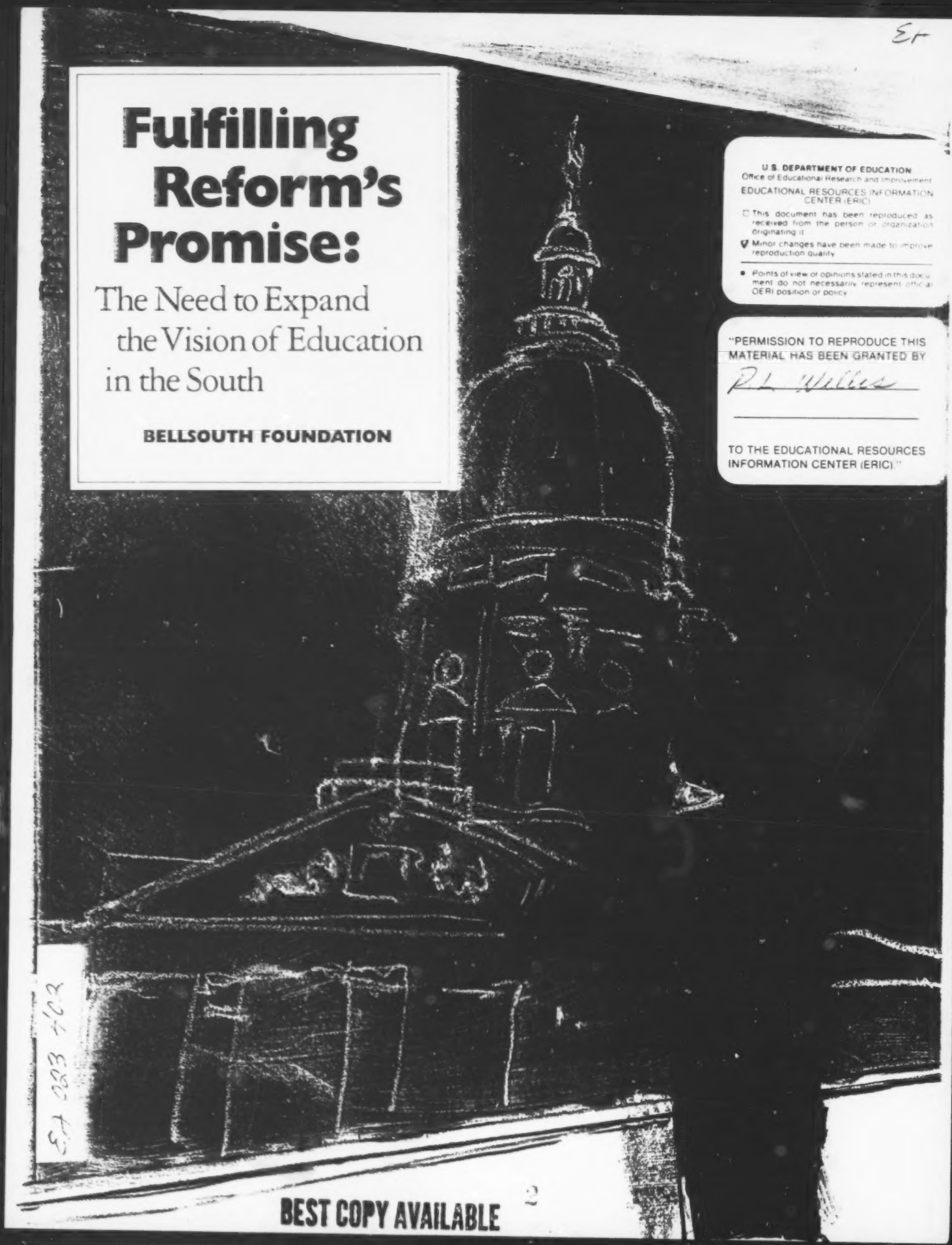
TITLE Fulfilling Reform's Promise: The Need To Expand the Vision of Education in the South.
INSTITUTION BellSouth Foundation, Inc. Atlanta, GA.
PUB DATE Jul 91
NOTE 46p.; Illustrations may not reproduce clearly.
PUB TYPE Reports - Research/Technical (143) -- Tests/Evaluation Instruments (160)

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Business Responsibility; Corporate Support; Educational Economics; *Educational Improvement; Elementary Secondary Education; *Philanthropic Foundations; *Private Financial Support; Private Sector; *School Business Relationship; School Restructuring
IDENTIFIERS *United States (South)

ABSTRACT

This study explored the role of philanthropy in educational reform. A survey of 22 educators with links to the southern United States was conducted to identify educational needs and to solicit ideas for educational improvement. Priorities redefined by the BellSouth Foundation in response to survey findings include supporting educators to meet students's changing needs, linking educational policy with changing regional needs, and expanding the role of information technologies in education. A conclusion is that reform is most efficiently accelerated through working at the professional and policy levels of education in conjunction with public support and collaboration among private organizations. Thirteen charts and graphs illustrating regional economic and population trends and projections for the next decade are included. Appendices include the evaluation questionnaire and lists of task force members and their reports, BellSouth management panel members, and advisory committee members. Several drawings illustrate the text. (12 references) (LMI)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****



Fulfilling Reform's Promise:

The Need to Expand the Vision of Education in the South

BELLSOUTH FOUNDATION

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☐ This document has been reproduced as received from the person or organization originating it.

☑ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

P.L. Wilkes

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

BEST COPY AVAILABLE

Fulfilling Reform's Promise:

The Need to Expand the Vision of Education in the South

BELLSOUTH FOUNDATION

July 1991

The BellSouth Foundation wishes to thank Robert A. Kronley for his invaluable contribution to the conception, direction and development of this report and the study process that preceded it. Mr. Kronley is a lawyer and educator in Atlanta, Georgia, who provides consultative services to corporations, foundations and nonprofit organizations in education, public policy, strategic planning and organizational development.

Contents

5 Preface by the Chairman of BellSouth Corporation

7 Foreword on Behalf of the Advisory Committee

9 Introduction by the Executive Director of the BellSouth Foundation

11 Executive Summary

15 Progress and Possibilities: The South in the Next Decade

20 Education in the Region: Reform at Risk

26 Regional Philanthropy and the BellSouth Foundation

30 Pursuing New Philanthropic Opportunity: The Process

34 Pursuing New Philanthropic Opportunity: The Findings

40 Refining the BellSouth Foundation Agenda

44 Conclusion

46 Appendix A

47 Appendix B

49 Appendix C

50 Appendix D

51 Appendix E

52 References

Charts and Graphs

16 Per Capita Income in the United States: 1990

16 Child Poverty in the BellSouth States: 1979-1989

17 Projected Population Changes in the BellSouth States: 1990-2000

17 Projected Percent Change in Job Growth in the BellSouth States & the United States: 1990-2000

17 Projected Percent Change in Employment Distribution in the BellSouth States & the United States: 1986-2000

20 Public High School Graduation Rates for the BellSouth States: 1982, 1987, 1988

23 Estimated College-Going Rates of Recent High School Graduates in the BellSouth States & the United States

23 Blacks as a Percentage of Total College Enrollment in the BellSouth States

23 Change in Per Pupil Expenditures for Public Schools in the BellSouth States: 1982 and 1988

23 Average Teacher Salaries

24 State Education Budgets as a Percent of Total Budgets in the BellSouth States

24 State Revenues & Expenditures in the BellSouth States: 1990-1991

29 Selected Fiscal Data on Foundations in the BellSouth Region

Preface

John L. Clendenin
Chairman and CEO,
BellSouth Corporation

In the 1980s, the South gained national recognition for moving to improve education. We have seen some progress. But most of us would agree that the reforms clearly have not yet given the South schools that are equal to the challenges of the Information Age. Indeed, in some groups we actually are seeing declines in educational attainment.

We at BellSouth are concerned for several reasons. The core of our business is here in the region; we live and work in communities throughout the South. Our future, then, in business and as parents and private citizens, is tied inextricably to the region's development. And because our future is tied to the region's development, our future is tied to the region's schools. We remain committed to doing our part to improve them.

More than a year ago we resolved to make the BellSouth Foundation a more potent catalyst for education reform in the South. We believed it was critical that educators provide the impetus for changing our direction. Thus, we turned to a distinguished group of 22 men and women whose collective experience spanned the full range of education.

Chairing the advisory group to these teachers, administrators, consultants and policymakers was Lamar Alexander, former governor of Tennessee, who has since become the U.S. Secretary of Education, and Dick Riley, former governor of South Carolina.

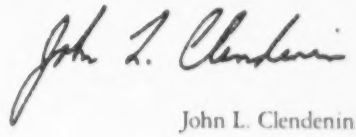
Our charge was straightforward: Be open, be bold, be creative, we told them; we want your best ideas about where the BellSouth Foundation could most prudently target its efforts. Underlying these suggestions would be a vision of the aims that could guide other private efforts as well as the larger public efforts in education reform.

This report is a distillation of these educators' findings and insights. We hope it might be a means of amplifying their voices in framing public debate about education in the South — where we are and where we should be going as the South moves into a global and Information Age economy.

The urgency of their voices should be heard. After a decade of reform, we sense frustration over the pace of improvement, a feeling that no matter how much progress we make, the problems of education continue to snowball. In other cases, there is complacency, a feeling that education has been addressed and now it is time to move on to other issues.

These twin ailments of frustration and complacency threaten to forestall the development of a more prosperous South in which opportunity is more equitably dispersed among our people.

The educators whose suggestions we offer here see this danger; they understand the economic and social imperative for better schools. Rather than succumbing to either frustration or complacency, they would have us expand and accelerate our efforts. Their findings are important not only for the BellSouth Foundation but for philanthropy everywhere in the South and for the larger cause of education throughout the nation. We are pleased to offer their ideas.



John L. Clendenin

Foreword on Behalf of the Advisory Committee

Southerners are justifiably proud of the leading role that states in the region played in promoting education reform in the past decade. It was in the South that business leaders, educators and government officials came together around a common vision of how improvements in education could strengthen the economy and transform people's lives. The ideas which were first implemented in the South became nationally prominent as other states linked new education reform measures to the need for economic development.

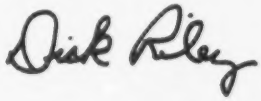
For over a year I cochaired a committee which advised the BellSouth Foundation's extensive investigation of how organized philanthropy can most effectively encourage and support renewed efforts to improve education. The process which the foundation used actively sought out the different views of a wide variety of individuals dedicated to revitalizing education. They included, among others, public officials, school leaders, teachers, business people and nonprofit officials. Some were BellSouth Corporation employees, but most came from outside the corporation.

The foundation's process highlighted what those working in the public sector have long regarded as essential for meaningful educational improvement—the need to connect different parts of the educational enterprise in a continuous, interdependent program, and the need for educators to collaborate with other people in developing and implementing new policies and practices directed at learners.

The BellSouth Foundation's process was unique and important. More significant, however, was its substance. It is noteworthy, but not surprising, that BellSouth recommends significant new investment in education improvement. What is especially compelling, however, is that a company-sponsored philanthropy, after a detailed analysis of the roots of education reform, looks deeper than the courses and skills that education might foster in its work force. The report tells us that education reform must address the host of human needs that allow children to benefit from schooling and that prepare learners to live in a world with no geographic boundaries. Education, then, takes on a new meaning—one that encompasses the total physical and emotional, as well as intellectual, development of the learner.

This new definition of education requires new approaches to schools and to human services. It requires new relationships between the public and private sectors, and within the public sector as well. This broadened understanding of education characterizes the activities which will become part of the foundation's new program.

The BellSouth effort reinvigorates recent approaches to educational improvement and extends reform into new arenas. Most significantly, it calls for strong and continuing leadership of the business and philanthropic sectors in the South in education reform. I endorse this effort and will, with my colleagues on the advisory committee, work to ensure its success.



Dick Riley

7

Introduction by the Executive Director

Foundations have a special responsibility to examine periodically their assumptions and to review their practices. This responsibility is not a legal requirement but a moral imperative to respond to changing community needs in a bold and thoughtful way.

During the first four years of grantmaking, we learned an enormous amount about education, the exclusive focus of the BellSouth Foundation. We were gratified by the creativity and commitment of the educators who brought us proposals, but we were aware that our dollars were miniscule in the bottom line of public sector expenditures for schooling. We hoped to make our funds and our activities more powerful in improving educational success for all children.

Early in 1990 we invited educators from throughout the southern states served by BellSouth telephone operations to help us forge a new agenda. Their commitment was extraordinary, their honesty essential, their experience critical to our desire to look anew at how philanthropy could make a real difference in education.

With the release of this report, the BellSouth Foundation responds to the extensive work and collaboration of these educators. In doing so, the foundation expands its vision of education and its vision of itself. We will go beyond our previous focus on teachers in schools and colleges to support all educators in increasing their understanding and responsiveness to the needs of students. We further commit to promoting active discussion of new public and education policy because we recognize that student success is dependent on new ways of thinking about and governing education and other services for children. Finally, our guidelines will recognize the powerful role that technology must play in helping teachers and students to achieve their educational goals and to participate in the Information Age.

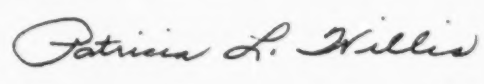
The BellSouth Foundation also will broaden its activities beyond just grantmaking. We will work to create and support networks of educators, convene diverse parties around educational issues, and support selected research, training, and technical assistance.

The priorities and strategies of these new directions reflect three important understandings:

- Teaching and learning take place in the context of leadership and public policy at the local, state and national levels.
- The increasing social, economic, and cultural diversity of students requires better understanding of and responsiveness to student needs.
- The role of technology in our social, political and economic interests requires students to use technology to its fullest potential.

Fulfilling Reform's Promise speaks to the recent history of education reform in the South, but its main purpose is to compel us to think more strategically about the role that philanthrophy can play in improving education. While education is primarily a public financial responsibility, philanthropy can promote energy, leadership and creativity in every segment of the community to increase the pace and accomplishment of education reform.

The BellSouth Foundation's work for more than a year demonstrated the value and opportunities of collaborative efforts. We look forward to continuing to work with educators, foundations, corporations, policymakers, and the larger community to improve education for all children and students in the South.



Patricia L. Willis

Executive Summary

After a decade of reform, the need to improve education in the South remains urgent. In fact, despite significant increases in tax support, academic progress has been limited and economic gaps have widened.

Fulfilling Reform's Promise: The Need to Expand the Vision of Education in the South suggests new directions to bring about genuine improvement in the region's schools and colleges. It is the product of a yearlong investigation sponsored and conducted by the BellSouth Foundation. At the foundation's request, 22 men and women with strong ties to education in the South put their collective knowledge and experience together and, after much discussion and reflection, offered their best thinking as to where reform should go and how philanthropy could participate effectively. Their efforts were guided by an advisory committee chaired by Lamar Alexander, former governor of Tennessee and recently appointed secretary of the U.S. Department of Education, and Dick Riley, former governor of South Carolina.

These men and women recognize the economic and other progress the South has made in recent years. Yet they also see lingering and worsening problems. With these problems and the demands of the future in mind, they suggest that we must expand our definition of education and adopt new visions of teaching, learning and leadership.

Philanthropy, including both foundations and corporations, can provide leadership and risk capital to further these ends. Yet the level of philanthropy in the South is small relative to other parts of the country, making collaboration among philanthropic organizations especially important. The ideas set out by these 22 education experts are suggested as guidelines that philanthropy might use in determining which programs offer the most potential for fulfilling the promise of education reform.

The need for a transformation in our vision of education arises from these conditions:

- As agricultural and manufacturing jobs decline in the South and service jobs increase, the work place of the Information Age demands more in the way of academically-based skills. But education reform is not yet delivering on its promise to teach such skills.
- Prosperity and job growth tend to be concentrated in selected metropolitan areas but bypass significant numbers of people. Thus, the region's problems in education contribute to an economic gap between black and white, city and suburb, rural and urban.
- Historically, there is a social and economic gap between the South and the rest of America. We earn less, get sick more and die earlier, especially if we are black, Hispanic or live in rural areas. The South's children suffer from these conditions more than children in the rest of the nation.

To create the caliber of schools demanded by the Information Age and by our ideals of equality and democracy, we must expand our vision of education to address basic human needs that, left unmet, hinder a child or young person in the classroom.

The educational experts who conducted the foundation's study examined six broad areas: learning; teaching; governance, management and organization; higher education; technology; and community colleges. They issued separate reports in each of these. As far-ranging as these were, common to all of them were certain values and ideas that underlie a broader approach to education.

Our task forces identified four major needs throughout education — from early childhood through colleges and universities: Expanding the scope of reform, creating new visions, making new connections, and developing and testing new ideas. Within these broad categories, these needs stand out:

- We must increase the public's commitment to education so we can maintain support through tough economic times and changes in elected officials.
- We must adopt new and powerful visions of learning that will make our students effective competitors and compassionate individuals.
- Education must recognize and respond to the growing

differences among students in social, economic, racial, and cultural backgrounds.

- Teachers must have authority, responsibility and resources to make decisions that help every child learn.
- Education must be administered as a continuum with elementary and secondary schools linked to the policies and programs of community colleges, senior colleges and universities.
- State-based policies such as certification, curriculum, and accreditation must relate to national and international standards and norms.
- Children and their families must be healthy, secure, fed and housed before they can learn and be motivated to achieve. This requires new levels of cooperation among parents, educators, communities and social service agencies.
- Making schools effective requires the development of leadership among teachers, principals, superintendents and school board members.
- New technologies must pervade our schools as tools for creative teaching and for ensuring access of all students to quality education.
- Accountability — from the top down — is essential for improvement but we must know what and how to measure our accomplishments.

In response to the findings of its educational advisors, the BellSouth Foundation will refocus its priorities for funding and other activities toward three program areas. The first, **Supporting Educators to Meet Changing Student Needs,** will support new approaches to teacher education, creative teaching, leadership development, and comprehensive service delivery. The second, **Linking Education Policy with Changing Regional Needs,** will focus on enhancing community support, strengthening decision-making bodies, and accountability and assessment. The third, **The Role of Information Technologies in Education,** will seek to expand the study of information technologies and to apply technology more effectively to teaching and learning.

In addition to its grants program, the foundation will use other methods to address its program interests. The foundation will serve as a convenor, develop networks of professional educators, and support action-oriented research.

The study and report process has deepened the BellSouth Foundation's commitment to education reform. It has reinforced its conviction that reform can and must be accelerated by working at the professional and policy levels of education. But the success of a philanthropic program depends on the cooperation and active support of the public sector and the collaboration of other foundations and private organizations.

Fulfilling the promise of education reform requires energy, patience and commitment to human need. The South historically has been characterized by personal compassion and endurance. The BellSouth Foundation is committed to using its resources to provide additional energy to a region that has overcome adversity in the past. We hope that this report highlights opportunities for others to join us in promoting new initiatives and new concepts of education that will help the region achieve its promise.

Progress and Possibilities: The South in the Next Decade

Celebration has marked most recent essays on the South. And rightly so. Change has been overwhelmingly positive during the past thirty years. The region has attracted considerable new capital. It has lured people to expanding urban centers. Urbanization has spawned cultural revitalization. The South, once reviled for enforcing separation among its people, is now often renowned for interracial cooperation. A place which historically looked inward for comfort and consolation increasingly looks with confidence beyond national borders to competition and challenge.

The quality of life, for many, has improved substantially. Once, the regional loyalty of southern citizens was based on its image of warmth and gentility. Today, that loyalty derives even more from a promise of opportunity and achievement.

Yet change has not been universally positive. There are contradictions in what the South is experiencing. These contradictions deserve our consideration for, while the lives of some Southerners have improved, the lives of too many have not, and the best evidence indicates that these individuals will continue to fall further behind. Change has been continuous but progress has been uneven. Gaps between individuals and groups — black and white, urban and rural — continue to grow in the areas of health, wealth, education, and employment.

These widening gaps temper our celebration. They provide us also with an agenda that all segments of the society must embrace. If those who have benefited from change are to continue to benefit, they must work to expand the impact to all people in the South.

While national and regional reports of recent years have noted the positive transformation of the South, they likewise have underscored the need for continuing change. Most often they have called for greater investments in education as the most important means to ensuring ongoing economic growth.

Throughout the '80s, the call for increased investment in education in the southern states received resounding support. Expectations for educational improvement heightened.

We have seen some progress. The Southern Regional Education Board, in its 1990-91 annual report, states that "we have made some gains at the higher levels," noting increases in Advanced Placement enrollment, foreign language classes, and, to some extent, in basic levels of student performance. College going rates increased significantly in the region. On the other hand, SREB laments that "we have made too little progress with the disadvantaged children in our schools, who are growing in number." The comprehensive improvement that we hoped our investment would yield has eluded us.

What then must we do to help all of our children and young people succeed?

The agents of change must include more than just the public sector. Federal, state and local governments certainly are the conduits of tremendous resources. But the private sector, through business, nonprofit organizations, and foundations, must contribute substantial leadership, direction and resources. Their philanthropic initiatives can be the source of creative alternatives and expanded access. They can pose the unthinkable questions and dare the apolitical responses.

When philanthropy seeks to promote change, it does so, not out of a legal requirement, but out of a

moral imperative to respond to changing community needs in a bold and thoughtful way. To be effective, programs must be rooted in the realities of the present and have the capacity to anticipate and shape trends. Success depends on an understanding of where we are and where we are going.

Where We Are

We begin with an abiding condition.

Despite all of its progress, the South's people remain financially worse off than those in other regions of the country. Per capita income has improved in the South, but it still lags significantly behind the rest of the nation.

Poverty remains high. When measuring the percent of households with incomes below the poverty line, all BellSouth states rank in the poorest half of the United States. Six are in the poorest 20 percent.

While poverty is no stranger to many Southerners, it is even more familiar to minorities. The effects of years of racial discrimination are present in virtually every indicator of economic conditions and educational attainment. In 1987, almost 35 percent of blacks in the South had incomes below the poverty line; more than 30 percent of Hispanics in the region were considered poor.

Poverty also strikes disproportionately at the young. In 1987, almost 25 percent of the South's children were poor; the number of black and Hispanic children who lived in families with poverty-level incomes exceeded 40 percent.

The extent and the severity of child poverty in the region becomes even clearer when we look at the changes over ten years. From 1979 to the late 1980s, the percentage of children in poverty in each of the BellSouth states increased up to nine percentage points. In three of the nine states, over 30 percent of children live in poverty.

Poverty in the region is widespread. One-third of all urban poor people in the United States live in the South. Yet as bad as urban poverty is, the rural South is marked by gnawing poverty which makes a mockery of work. Almost half of the heads of households in the rural areas who have full-time jobs still do not earn enough to remove their families from poverty. The rural South is affected by poverty more than any other region in the country, and despite the growth of its cities, the South, for the most part, retains its rural character.

We know then that while many have benefited

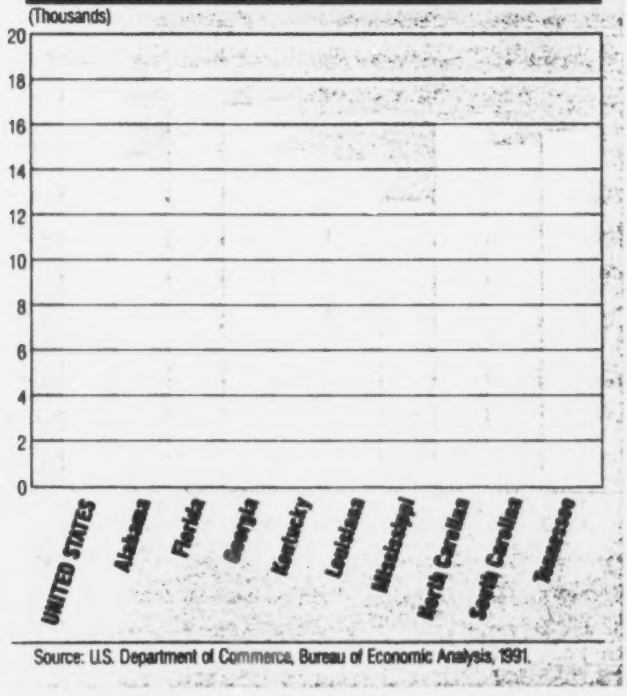
CHILD POVERTY IN THE BELLSOUTH STATES: 1979-1989

	Percentage of Children in Poverty		National Rank
	1979	1985-1989	1991
UNITED STATES	16.0	20.1	—
Alabama	23.6	30.9	49
Florida	18.5	20.0	31
Georgia	21.1	23.8	42
Kentucky*	21.6	22.2	38
Louisiana	23.5	32.4	50
Mississippi	30.4	34.3	51
North Carolina	18.3	18.3	26
South Carolina*	21.0	22.2	38
Tennessee	20.6	25.7	44*

* = 3-way tie with Montana

Source: Center for the Study of Social Policy, Kids Count Data Book 1991 (Washington, D.C.: Center for the Study of Social Policy), 1991.

PER CAPITA INCOME IN THE UNITED STATES & BELLSOUTH STATES: 1990



Source: U.S. Department of Commerce, Bureau of Economic Analysis, 1991.

from the changes in this region, too many continue to suffer. And we are aware that economic conditions can get worse.

Where We Are Going

Continuing change presents opportunity for the region; it also is its greatest challenge. The South in the year 2000 will be a different place than it is today.

- It will be more populous. The population of the nine BellSouth states will grow to more than 54,681,000 people, an increase of 11.6 percent. The nonwhite population will increase by 14.4 percent.
- Growth will not be uniform. The population growth in five of the nine BellSouth states will exceed the projected U.S. growth rate of 7.52 percent; four states — Alabama, Kentucky, Louisiana, and Mississippi — will grow at below the national rate.
- The population will be older. There will be declines in the college-age (15-34) population, and the school-age population in the BellSouth states will grow at a lower rate than that in the nation (9.8%), in all states except Florida and Georgia.

PROJECTED POPULATION CHANGES IN THE BELLSOUTH STATES: 1990-2000

	Age Groups as a Percent of the Total Population						
	0-14	5-19	15-24	15-34	35-44	45-64	65+
UNITED STATES	2.2	9.8	−3.6	−6.9	15.7	30.0	9.9
Alabama	6.2	3.3	−4.0	−7.3	15.7	23.9	10.5
Florida	22.7	21.6	8.2	4.7	19.4	33.8	25.5
Georgia	13.3	11.9	8.0	3.5	19.0	40.8	24.8
Kentucky	1.0	0.0	−6.2	−11.1	8.6	20.2	2.0
Louisiana	−0.2	3.7	−8.2	−13.6	9.2	16.3	9.2
Mississippi	4.9	0.3	−5.3	−8.5	14.9	21.6	6.3
North Carolina	4.7	7.1	0.9	−4.4	19.2	33.5	27.2
South Carolina	6.4	7.0	3.1	−4.1	18.8	35.5	19.1
Tennessee	4.7	2.7	−2.6	−5.7	12.4	28.6	13.7
BELLSOUTH	9.7	9.0	0.5	−3.1	16.3	30.5	19.4

Source: BellSouth Corporation Projections, February, 1991.

Southerners will be dependent upon a shifting economy and one which contains significant contrasts. On the whole, the South projects opportunity for its citizens — total employment for the BellSouth states in the year 2000 is estimated at 16.8 percent above the 1990 level; employment growth in the nation as a whole is projected at 14.5 percent. This growth will represent an addition of 3.5 million jobs in the region — about 22 percent of all the new jobs nationally. Yet job growth in the Bellsouth states will be uneven; only four states — Georgia, Florida, North Carolina and South Carolina — project growth above the national average.

PROJECTED PERCENT CHANGE IN JOB GROWTH IN THE BELLSOUTH STATES & THE UNITED STATES: 1990-2000

Florida	22.7
Georgia	20.5
North Carolina	17.9
BELLSOUTH STATES	**16.8**
South Carolina	15.5
UNITED STATES	**14.5**
Tennessee	13.4
Alabama	11.1
Kentucky	10.6
Mississippi	9.6
Louisiana	8.0

Source: BellSouth Corporation, January 1991

Just as new jobs will be found in different places, they will be in different occupations. Agriculture and manufacturing will continue to decline, while service occupations, with their need for professional, managerial and technical competencies, will show significant growth. New jobs will require education beyond current high

PROJECTED PERCENT CHANGE IN EMPLOYMENT DISTRIBUTION IN THE BELLSOUTH STATES & UNITED STATES: 1986-2000

	Manufacturing	Services
UNITED STATES	−3.8	47.3
Alabama	2.4	33.4
Florida	17.0	60.4
Georgia	1.7	47.4
Kentucky	−1.9	40.8
Louisiana	−3.6	41.6
Mississippi	2.9	27.1
North Carolina	2.5	43.3
South Carolina	0.4	42.2
Tennessee	−2.6	43.1

Source: Southern Regional Education Board, Trends (Atlanta: Southern Regional Education Board, 1989), 17, table 12.

school curriculum and very few of them will be classified as unskilled.

The need for more workers will coincide with declining numbers of secondary school and college-age populations. To fill an increasing number of skilled jobs, greater percentages of our young people must attain higher levels of education and training and the current adult population must have access to training and education opportunities.

We quote these projections knowing they have been discussed before. We do not describe new needs, only heightened ones.

Improving Education for Economic Development

For many years, the economy of the South had been characterized by a constricting dependency. The creation of new jobs depended upon importing national plants and businesses which often were attracted by cheap, nonunion labor, a work force that also was poorly-trained and unskilled.

There was limited profit in staking the future of the economy on cheap labor and externally-based corporations — it perpetuated ignorance and dependence. A prosperous future demanded an expansion of the region's capacity to grow and nurture new industries within the South. The future required opportunities for educated people already in the region to remain and work productively, but also needed to continue to attract talented persons from elsewhere. Primarily, however, the region had to greatly increase its capacity to educate and train more of its native citizens for a new economy. The economy would be an international one and a technological one, marked not by southern dependence but rather by active participation in a global flow of goods and services.

Thus, better education was seen as the key to economic development. Growth was expected as educational attainment rose, but improvement in education was dependent on increased investment in the education system.

This perception grew and its articulation by business leaders coincided in the late 1970s and early 1980s with the election of younger, progressive and reform-minded governors in many southern states. They had come to office determined to put behind them and their constituents the debilitating effects of the prolonged struggle to attain equal rights for all Southerners. They wished to improve the lives of their citizens. Improvement in the econony was central to this goal and they were quick to make common cause with business leaders in their states.

The result of these alliances was the wave of education reform which distinguished the South in the early 1980s. The initiatives of Governor William Winter in Mississippi, Governor James Hunt in North Carolina, Governor Dick Riley in South Carolina, and Governor Lamar Alexander in Tennessee preceded the release of the 1983 national study, *A Nation At Risk*, which urged increased national investment in education.

While the southern governors were personally and politically committed to the benefits that better education would have for all of society, their efforts in formulating and enacting successful education reform legislation frequently were centered around pragmatic appeals to economic well-being. This strategy was best expressed in the highly-regarded report of the 1986 Commission on the Future of the South, *Halfway Home and A Long Way To Go:*

> "Continuing investment in public schools can make southern students nationally competitive as thinkers and doers in the next century's workplace, one which will be as intricate as a microchip and as far-reaching as the globe."

Appeals to pragmatism were successful. Southern states, whose educational systems had been scorned, provided model legislation for other states as efforts to improve education spread. Southern governors became nationally recognized as experts on education reform and increasingly respected for their ability to craft coalitions of legislators, business people and educators to transform state education policy.

Changes in funding, policy and educational practice yielded some improvements in selected test scores, but increasingly we are recognizing the limited impacts of the early reforms on the economic indicators

that motivated them. Employability, literacy and poverty are growing issues, not declining issues.

The legacy of reform in the South inspires us to re-examine the assumptions and outcomes of educational improvement initiatives. The public/private partnerships and nonpartisan coalitions created by the first ten years of reform offer a foundation from which to advance our efforts in education reform. With the strength of our common commitment, we can reach deeper for a more fundamental understanding of how to resolve the growing economic dependency of many of our people. Only by continuing to work together can we protect and build on the initial strides we have made to improve the education system.

Education in the Region: Reform at Risk

Education reform as it was styled in the early 1980s was seen as the key to the economic development of the South. Early reform legislation aimed to increase the requirements of students, the competence of teachers, and the opportunities for the public to know how well students and schools performed. Change was sought by:

- Raising high school graduation standards, typically including course requirements and hours or days in school;
- Demanding more evidence of satisfactory performance from students and teachers through utilization of new assessment measures;
- Providing more financial support for elementary and secondary education; and
- Making teaching more attractive, particularly through salary increases.

A brief look at indicators in these areas reveals that the results of education reform have been mixed. This is especially true about attempts to increase and improve the pool of those who are ready to go on to higher education.

Between 25 and 42 percent of students in each of the BellSouth states did not graduate from high school in 1988, compared to 29 percent nationally. Only Alabama had more than 70 percent of its students graduating. Over six years, only three BellSouth states improved graduation rates by more than five percent.

Of those students who do graduate, slightly fewer go on to college from southern states than from the nation as a whole. Blacks make up a declining percentage of those who are in college. In every BellSouth state, blacks as a percentage of total college enrollment in the state, decreased by up to 2.3 percent from 1976 to 1986.

PUBLIC HIGH SCHOOL GRADUATION RATES FOR THE BELLSOUTH STATES: 1982, 1987, 1988

	1982	1987	1988
UNITED STATES	69.5%	NA	71.2%
Alabama	63.4%	70.2%	74.9%
Florida[1]	60.2%	58.6%	58.0%
Georgia	65.0%	62.5%	61.0%
Kentucky	65.9%	67.4%	69.0%
Louisiana	52.9%	60.1%	61.4%
Mississippi	61.3%	64.8%	66.9%
North Carolina	67.1%	67.8%	66.7%
South Carolina	63.8%	66.9%	64.6%
Tennessee	67.8%	67.8%	69.3%

Source: Joseph D. Creech, Educational Benchmarks 1990 (Atlanta: SREB, 1990) 15, table 3.

[1]U.S. Dept. of Education notes that Florida uses different information for determining the graduation rate than that used for other states in the rates reported here.

Finally, there is a dismaying number of college entrants who require remedial work. Even with the more stringent graduation requirements imposed by reform legislation, many of those who go to college begin behind. In a survey of all two- and four-year public institutions in 15 southern states, the Southern Regional Education Board asked how many entering freshmen in 1988-89 needed remedial courses in reading, writing or mathematics. Eighty percent of institutions surveyed responded that more than 25 percent of all entering freshmen seemed to require remediation in reading and writing while one-third of entering freshmen appeared to need remedial work in mathematics.

Education reform can be measured in part by the increase in funds for elementary and secondary edu-

BEST COPY AVAILABLE

ESTIMATED COLLEGE-GOING RATES OF RECENT HIGH SCHOOL GRADUATES IN THE BELLSOUTH STATES & THE UNITED STATES

	Public High School Graduates 1987-88	1st-Time College Freshman Who Are Recent High School Graduates Fall, 1988	Enrollment Rate
UNITED STATES	2,496,628	1,331,774	53%
BELLSOUTH STATES	453,228	234,438	52%
...as % of U.S.	18.15%	17.60%	
Alabama	43,779	22,621	52%
Florida	89,206	42,219	47%
Georgia	61,765	31,765	51%
Kentucky	39,484	23,008	58%
Louisiana	39,058	19,764	51%
Mississippi	27,896	15,119	54%
North Carolina	67,836	37,408	55%
South Carolina	36,300	18,175	50%
Tennessee	47,904	24,359	51%

Source: Marks, Joseph L., SREB Fact Book on Higher Education 1990 (Atlanta: Southern Regional Education Board, 1990), 31, table 13.

cation. Six of the nine BellSouth states increased state-funded per pupil expenditures by more than 20 percent between 1982 and 1988. Despite this effort, all BellSouth states but Florida continue to rank in the bottom 25 percent in the nation in dollars spent per child on education.

Much of the increase in state funding for education was used for improving teacher salaries. The percentage of increase slightly exceeds that for the United States as a whole but, once again, the region finds itself

BLACKS AS A PERCENTAGE OF TOTAL COLLEGE ENROLLMENT IN THE BELLSOUTH STATES

	1976	1986
Alabama	21.1	20.8
Florida	11.5	9.2
Georgia	18.3	17.6
Kentucky	7.4	6.1
Louisiana	23.3	22.9
Mississippi	30.1	28.5
North Carolina	19.1	17.8
South Carolina	20.9	19.3
Tennessee	14.6	14.0

Source: Southern Regional Education Board, Trends (Atlanta: SREB, 1989) 12, table 8.

CHANGE IN PER PUPIL EXPENDITURE FOR PUBLIC SCHOOLS IN THE BELLSOUTH STATES: 1982-1988

	1982 Exp.*	Rank	1988 Exp.	Rank	% Change in Exp.
UNITED STATES	$3373	—	$4243	—	26%
Alabama	$2553	43	$2718	48	6%
Florida	$3023	34	$4092	25	35%
Georgia	$2498	44	$3436	39	37%
Kentucky	$2407	45	$2667	49	11%
Louisiana	$3205	30	$3138	43	−3%
Mississippi	$2111	51	$2548	50	21%
North Carolina	$2607	42	$3368	41	29%
South Carolina	$2360	44	$3408	40	44%
Tennessee	$2345	48	$3068	45	31%

*1988 dollars.

Source: The Center for the Study of Social Policy, Kids Count Data Book 1991 (Washington, D.C.: Center for the Study of Social Policy, 1991).

in a position where keeping up means staying behind.

In many cases, the additional funds expended for elementary and secondary education were accompanied by reductions for spending in higher education. Increased investment in one educational system at the perceived expense of another has bred competition among essential institutions which increasingly need to cooperate in improving learning at all levels.

AVERAGE TEACHER SALARIES

	1984-85	1989-90	% Increase
BELLSOUTH STATES	$19,788	$26,388	33.9
UNITED STATES	$23,546	$31,304	32.9

A National Governors Association review of educational results for the United States at the end of 1990 declares that "student achievement remains at a standstill." In the South, the progress made in financial commitments to education has not generated equal progress in educational results, nor in economic indicators that reflect educational attainment. Continued commitment to education improvement is threatened by frustration with the slow pace of change. And frustration will increase as we confront looming fiscal and social realities and their impact on our aspirations for a more effective education system.

STATE EDUCATION BUDGETS AS A PERCENT OF TOTAL BUDGETS IN THE BELLSOUTH STATES

	Elementary & Secondary Education		Higher Education	
	1983-84	1987-88	1983-84	1987-88
Alabama	17.7	17.5	10.7	10.4
Florida	20.9	20.9	6.6	5.0
Georgia	18.9	22.5	7.9	6.4
Kentucky	18.7	19.4	9.4	9.2
Louisiana	17.5	17.5	8.2	7.6
Mississippi	18.9	22.0	10.4	9.6
North Carolina	21.9	21.6	11.9	10.9
South Carolina	21.7	22.9	10.3	9.2
Tennessee	15.5	15.5	7.1	7.0

Source: SREB files.

Trends

Continued educational improvement is jeopardized by mounting fiscal constraints. Education is the largest item in state budgets. Southern states' support for elementary and secondary education has increased in the last decade while federal support has declined. Yet, throughout the country, the states' financial situations are not good. More than half of them project shortfalls in revenues for the 1991 fiscal year. The BellSouth states are no exception. Late in 1990, six of the nine states projected budget deficits for the fiscal year; six had cut or were planning to cut their 1990-91 budgets, based on revenue shortfalls.

The serious problems posed by lack of resources are compounded by the need for equity in how those resources are used. Many states are facing legal challenges to how they fund education. Financing schemes which perpetuate disparities between wealthy and poor communities are viewed increasingly as inequitable and self-defeating. As demonstrated in Kentucky, challenges to funding formulas also open up opportunities to challenge the structure and organization of schooling. How the states respond to these perceptions will affect substantially the future of education improvement.

The failure of the 1980s reforms to produce significant changes in secondary and postsecondary educational measures or in selected economic measures has led to national, regional and state consideration of specific goals for education. In 1988, the Southern Regional Education Board adopted nine goals, most of which were incorporated into the six goals established by the nation's governors and adopted in 1990. Subsequently, each of the southern states announced specific goals which it will pursue through the year 2000.

STATE REVENUES & EXPENDITURES IN THE BELLSOUTH STATES: 1990-1991

	Percentage over or (under) budget target	Excess or (deficit) in millions	Cutting budget?
Alabama	on target	—	Yes
Florida	6.2%	−$688	Yes
Georgia	−7.8%	−$342	Yes
Kentucky	on target	—	No
Louisiana	2.4%	$100	No
Mississippi	−3.8%	−$ 76	No
North Carolina	−4.0%	−$264	Yes
South Carolina	−2.7%	−$ 82	Yes
Tennessee	−3.5%	−$130	Yes

Source: New York Times, Sunday, Dec. 30, 1990, F-11.

Among the goals established by these various jurisdictions are goals that focus on factors external to the school environment. Preschool readiness, parent participation, and drug-free communities are targets of the new education agendas. They make a compelling statement that education improvement, to be effective, must be tied to social needs and institutions that are broader than the education system itself. They also suggest that we measure progress in terms of how well we meet human needs, in addition to measuring academic achievement.

And if these basic human needs are not met, attempts to improve education will fall short. The consequences will be painful, for individuals and for the region. The Southern Regional Education Board predicts that "too few students will be ready for the first grade and too few will graduate from high school; minority students will continue to have lower levels of academic achievement, higher dropout rates, lower levels of literacy than their white counterparts; college enrollments will decline and the disparity in the rates at which black, Hispanic and white students attend college and earn college degrees will continue; many states, and their citizens, will not be

prepared for the jobs requiring higher skills that are projected to be available."

Realizing the promise of reform means expanding our vision of education. It means giving priority to human and social needs that support the individual's ability to achieve educational and economic well being. Considerable energy and will are required to realize this promise. It demands cooperation between the public and private sector, across educational systems, and between for-profit and nonprofit organizations.

In the nonprofit sector, philanthropy can play a central role in expanding education reform. Selective investment by private foundations and corporate philanthropy can do more than facilitate material improvements in schools. It can affect positively the public will to improve education. It can promote the radical restructuring of concepts and organizations that public funds cannot risk. But to do so requires an organized, strategic approach, and it must be enhanced by collaboration within the philanthropic community and with the public sector as well.

Regional Philanthropy and the BellSouth Foundation

Southerners pride themselves on neighborliness and, more often than not, this pride is justified. Neighborliness often expresses itself in reaching out and caring for others and in nurturing the relationships which constitute community. These customs, long associated with the region, are often manifest in acts of private charity that seek to help others overcome grief, distress, or hard times.

Individual caring and commitment to community are valuable social attributes. They can influence institutional forms of charity and philanthropy represented by foundations and corporations.

In the South, the history of foundation giving is distinguished for the most part by dollars that have come to it from elsewhere. Organized foundation activity in the United States after the Civil War primarily involved support from northern industrialists for education of the newly-freed slaves or for healing the wounds of a war-ravaged South. This pattern persisted after the turn of the century and continued through the depression. Outside philanthropic involvement in the region heightened with civil rights activities, many of which were related to education.

The philanthropy of the North generally was not paralleled by organized philanthropy in the South. The South did not, with certain notable exceptions, spawn the great industrial wealth which characterized other regions. In the relatively few instances where significant wealth resulted in substantial organized philantrophic activity, it usually was used to create major new institutions such as hospitals and universities.

The number and capacity of foundations located within the South lags significantly behind other parts of the nation. This is especially true in the nine states in which the BellSouth Foundation is active. According to preliminary 1990 census figures, these states have almost 20 percent of the population of the United States. But standard measures of foundation activity in these states do not approach this figure. The BellSouth states are home to 12 percent of the 7,581 foundations listed in *The Foundation Directory*; these foundations have 7.6 percent of reported assets and account for 7.9 percent of total giving.

Foundations headquartered in the BellSouth states are, for the most part, small independent organizations concerned about local needs rather than policy questions. While many support education, such support often is expressed through grants to colleges and universities or to support individual scholarships for students.

The BellSouth Foundation

The establishment of an endowed professionally-staffed foundation by BellSouth Corporation in 1986 was a significant addition to philanthropy in the region. As measured by assets, the BellSouth Foundation ranks 19th in the nation among company-sponsored foundations. It is devoted to a single purpose: education in the South. The commitment to meeting regional needs through investment in education, as BellSouth Chairman John Clendenin noted, would promote creativity and advance "not only our material well-being, but also our intellectual and spiritual well-being."

The BellSouth Corporation is a product of change — mandated divestiture in the telephone industry. As the parent company of Southern Bell and South Central Bell Telephone Companies, it has inherited and expanded their commitment to corporate giving and community involvement. The BellSouth Foundation interacts with the

BEST COPY AVAILABLE

EDITOR'S NOTE:

The chart on page 29 -- "SELECTED FISCAL DATA ON FOUNDATIONS IN THE BELLSOUTH REGION" -- has a mistake. "Total Giving" for Kentucky should read 30,992. All other numbers and totals on the chart are correct.

SELECTED FISCAL DATA ON FOUNDATIONS IN THE BELLSOUTH REGION
(round dollar figures expressed in thousands)

	Number of Foundations	Assets	Total Giving
Alabama	64	292,981	20,617
Florida	303	2,095,061	158,075
Georgia	163	2,479,734	105,794
Kentucky	38	373,220	30,992
Louisiana	66	374,151	17,082
Mississippi	18	76,679	7,787
North Carolina	149	2,793,179	159,978
South Carolina	50	277,667	16,774
Tennessee	87	802,983	47,218
TOTAL	938	9,565,655	564,317
% of U.S.	12%	7.6%	7.9%

Source: *The Foundation Directory, 13th Ed.*, 1991.

programs of the subsidiaries and the educational interests of other corporate departments to expand the entire corporation's support for education in the region. These connections provide the foundation recognition and opportunities which might not ordinarily accrue to a similarly-sized foundation.

In its first years the BellSouth Foundation had four priorities:

Elementary and Secondary Programs

- Teacher recruitment, education and retention:
  - To increase the ranks of qualified, sensitive and dedicated individuals entering the profession.
  - To educate and train new teachers for early success and to motivate current teachers to innovate.
  - To retain good teachers through systems of participation, recognition and reward.
- Student motivation, particularly at middle school age:
  - To stay in school.
  - To perform to their level of ability.
  - To make rational life decisions, based on factual information and high self-esteem.

Higher Education Programs

- Telecommunications:
  - To promote excellence in curriculum development and research related to telecommunications.
- Retention and development of faculty:
  - In senior colleges and universities of the BellSouth states.
  - In science, engineering and business-related disciplines.
  - In programs that require faculty participation with other education, business and government institutions.

During four years of operation, the foundation announced 92 grants, totaling about $10.5 million. Many of the grants clearly reflected growing interest in fundamental change in how education is organized and how student needs are addressed. The foundation's program, along with those sponsored by other regional Bell holding companies, was increasingly recognized as one of "the leading edge forces behind public school reform" (New York Times, December 30, 1990, --11).

Reform, however, was undergoing close and often skeptical scrutiny. Many were questioning the efficacies of investment in and the rewards of reform. Others were raising more fundamental questions about the scope and nature of reform. The BellSouth Foundation increasingly was concerned about its ability to foster permanent improvement in the education system.

After a brief but rich history, the foundation determined that it would turn to the educators of the region to examine its past grantmaking and to make recommendations for the foundation's program for the next five years. The foundation's deliberations and response would consider the accomplishments and failures of education reform in the South and the potential for philanthropy to be a stronger catalyst for improvement.

Pursuing New Philanthropic Opportunity: The Process

The BellSouth Foundation's exploration of education and philanthropy drew upon both its past grantmaking experiences and the collaborative efforts of a very diverse group of educational researchers and practitioners.

All of the prior and current grantees of the foundation completed a survey about the effects of BellSouth grants on their institutions and on the issues related to their grant programs. Responses provided insights into the ability of grants to leverage additional funds and new audiences in support of the issue. They also described the evolvement of issues through changes in policy, practice, and funding. (See Appendix A for a copy of survey.)

The foundation's primary program for exploration relied on a multi-leveled process which was directed and supported by its staff and a principal consultant. At its center were 22 individuals assigned to task forces which were created to examine aspects of substantive educational issues that would benefit from philanthropic involvement. The group included educators from state, local, and regional education systems and nonprofit organizations; faculty members, deans, and presidents of colleges and universities; and researchers in a variety of educational interests. All were recognized experts on education issues and lived or worked in the nine BellSouth states. (See Appendix B for a list of task force members.)

Five task forces were established, each dealing with a broad issue: improving learning; improving teaching; improving higher education; improving the governance, management, and organization of education; and improving the use of technology in education. While the Bellsouth Foundation had not previously funded community college programs, it asked the task force on improving learning and the task force on improving higher education to address the distinct role and needs of community colleges. Subsequently, the issues of community colleges required a series of separate consultations and resulted in a sixth paper.

Each task force had four to six members, including a principal investigator and a panel of coinvestigators. The objective of the task forces was to suggest approaches to the issues and to make recommendations about how philanthropy could be most effective in meeting identified needs. Their reports were to grow, not out of new research, but out of the synergy and creativity of diverse experiences and honest dialogue. (See Appendix C for a list of task force papers and how to obtain them.)

Each task force met several times and, on occasion, met jointly. Their work was supported further by site visits to exemplary programs; discussions with groups of administrators, teachers, and policymakers; attendance at conferences; and consultations with individual experts. In addition, a panel of BellSouth corporate managers convened two times during the process to hear the progress of the task forces and to offer both personal and business reactions for consideration. (See Appendix D for members of the BellSouth panel.)

The task force process was guided by a distinguished advisory committee. The advisory committee was cochaired by Lamar Alexander and Dick Riley, former governors of Tennessee and South Carolina respectively. Governors Alexander and Riley are noted for their commitment to reforming public education. They chaired a group of education leaders — school superintendents, university presidents, labor officials and others prominent in addressing educational issues in the region. The advisory committee met three times, and reviewed and commented on plans, reports, and recommendations of the task forces and the BellSouth Foundation. (See Appendix E for names and affiliations

BEST COPY AVAILABLE

of advisory committee members.)

Although the foundation designed the process primarily to support an investigation into substantive issues, it learned a number of lessons from the process itself. These lessons will influence the programs of the BellSouth Foundation, and they also have significant implications for the nature of the activities the foundation will pursue. Among the lessons of the task force process are:

- Educators have too few opportunities to interact with each other, either within or across specialties, levels of responsibilities, or levels of education. The inter-task force meetings provided some of the greatest personal enrichment for task force members and significantly affected the task force reports.
- Effective approaches to learning as a continuum are hindered by the lack of a common language between K-12 educators and higher education. They are complicated further by an assumed hierarchy of status among elementary schools, secondary schools, community colleges, senior colleges and research universities. Until these language and status barriers are resolved, collaboration between and among the levels of education will not be effective in addressing the education needs of diverse students.
- Collaboration among individuals and institutions often enhances creativity, credibility and resources. It is essential for consensus and ultimately broadens the constituency that will support the results.
- Philanthropy has a unique role in facilitating new connections and enhancing collaboration. The independence and legitimacy of philanthropy give it a special capacity to convene or create networks around educational issues.
- To be effective in promoting change, philanthropy must work strategically to leverage public response. Responsibility and authority for education reform remains for the most part in public systems. This may involve partnership with public entities; it also calls for collaboration among foundations and corporate philanthropy.
- Educational change demands many approaches and comprehensive solutions. Philanthropy is uniquely positioned to take measured risks to meet this challenge.

The process, in effect, provided its own findings. They complement, in significant ways, the substantive findings of the task forces.

Pursuing New Philanthropic Opportunity: The Findings

The findings and recommendations of the task forces emphasize the extraordinary importance of placing the needs of the student at the center of decision making. Past reforms were unable to penetrate the complexities of the student's environment. New education reforms must be sophisticated in their understanding of the student and multifaceted in their implementation.

The findings transcend the boundaries of disciplines and levels of education; the success of education reform depends on a comprehensive approach. The task forces urge expanded and intensified efforts at education improvement that stem from broadened conceptions of learning, teaching and leadership.

These new conceptions of education depend on the development of new responsibilities and relationships of people and institutions, and on developing and testing new ideas. They require the diverse abilities of a broad range of key leaders. They especially require the participation and advocacy of business leadership which influenced the early drive to reform.

Some elements of reform depend on changes in national policy, economics and societal assumptions. Generating new public resources at the federal and state level is important, though it may not be feasible at this time. Much more, however, can be done with existing resources and by creating climates which will make possible greater commitment to increasing those resources later.

Substantive findings of the task forces address specific programs and values that philanthropy can support to make a difference in education. The programmatic recommendations are detailed in the separate task force reports. Their range and depth exceed the capacity of any one foundation but they offer an opportunity for collaboration between and among foundations and the public sector. (See Appendix C for how to obtain reports.)

Highlighted here are the common assumptions and values of the task forces that can provide a guide for decisions about philanthropic support and participation in education. They encourage grantmakers and other private sector supporters to seek more fundamental understanding of the impacts of the programs they support. Together they envision a broader approach to education and the objectives of education reform.

Expanding the Scope of Reform

Philanthropy, in particular, and the private sector generally, must keep the urgency of reform before educators, policymakers and the general public during difficult economic times.

- Despite the South's leadership in education reform, the region's education needs remain enormous; current trends suggest no sign of abatement of low achievement, minimal post-secondary participation and insufficient funding without substantial changes in national, state and local policy and practice.
- The climate for change created within the education system by the reforms of the 1980s must be enhanced by continous involvement and support from the private sector.
- Real education improvement requires private and public efforts to build statewide agendas and coalitions for sustained efforts at school reform and restructuring that are compatible with local needs.

The purpose of education reform must expand to human and social goals as well as economic goals.

- Early education reform was directed at economic objectives which restricted many reforms to levels of schooling where nonachieving students already had dropped out or were unlikely to perform under the

M.P.

new expectations.

- New reform efforts must recognize that unmet social and economic needs of children will inhibit their capacity to learn and respond to educational opportunities.
- The purpose of education reform must be to respond directly to the needs and abilities of each student, as a way ultimately to strengthen the social, political, and economic well-being of the community, state or region.

Efforts to improve education at all levels must incorporate and respond to the needs of the South's diverse population.

- Education must be sensitive to diversity in race, gender, age and national origin, but, in the South especially, it must respond to the special needs and situations of racial minorities.
- The rigidity and hierarchical nature of educational systems and institutions stymie student performance and hinder teacher creativity in addressing student needs.
- The perceptions, experiences and values of minority students and minority faculty have not been represented adequately at institutions of higher education.
- The South is experiencing substantial new public demand for higher education opportunities from minorities and nontraditional learners, i.e. those students who are older, in mid-career, with family responsibilities, or otherwise different from the 18-22 year old full-time student.
- Education as a process and as an institution must develop more appreciation, acceptance and support for diversity.

Creating New Visions

Effective education reform requires a new and powerful vision of learning which will prepare students to function autonomously and creatively in an interdependent society.

- Education outcomes should be focused less on the content of the curriculum than on inspiring learners to think.
- Learning depends on developmental stages which are connected to each other. Three key periods where there are special opportunities to affect future learning are early childhood, middle school grades, and postsecondary education.
- Real learning is an active process and takes place in a social context.

Effective education reform requires a powerful new vision of teaching that redefines teacher recruitment, training and professional development.

- Education must embrace a philosophy of human resource planning and development that stresses the worth of teachers and their ability to understand and meet the needs of individual students.
- Teachers must be the principal architects of learning programs for students and development programs for other teachers.
- Teacher training programs need to be revitalized so that they are rigorous and continuous from pre-classroom through high levels of mastery.
- Recruitment and retention efforts for minority teachers need to be expanded.

Effective education reform requires the aggressive identification and development of participatory leaders at all levels.

- Teachers must be regarded as leaders — as powerful, creative and effective professionals who have real control over the instructional program and environment.
- Effective training for superintendents and principals needs to include more than management training; it must also include leadership development.
- Governing bodies need training and support to meet better their increased responsibilities, as schools and systems become more complex.

Technology has an important, but as yet unrealized, role to play in education improvement.

- The general impact that technology has had on education is limited by misguided views of what learners and teachers need.
- Significant efforts should focus on bringing powerful technology directly to the hands of the teacher to improve classroom management, instruction, and communication.
- The vast majority of today's teachers have had little or no training in how to apply technology to teaching and learning.
- The installed base of computers currently in schools generally is inadequate and uses outmoded and unso-

phisticated technology.

- Comprehensive planning is critical for appropriate acquisition and use of technology in education, but this planning has been sorely lacking.

Making New Connections

The educational enterprise is greater than any institution or educational system; effective education calls for new and improved forms of collaboration.

- Postsecondary institutions and elementary/secondary education must overcome their isolation from each other; community colleges provide special opportunities to link different educational interests and institutions.
- Teacher education must be related to the real needs of elementary and secondary schools and should be connected to other disciplines and parts of higher education.
- Four-year higher education institutions have an important role to play in education reform beyond teacher and administrator training. This role includes testing new ways to transfer knowledge, literacy training, and research into effective educational practices.
- Community support for education is fragmented and, in some areas, decreasing; an intensive effort at building effective community support for education is required.
- Jurisdictional regulations in too many cases present outmoded and unnecessary barriers to developing effective regional approaches to education improvement. For example, teacher recruitment is hampered by the variation in certification requirements across the southern states. Also, pension portability issues affect the number of administrators willing to transfer systems which would provide an infusion of new ideas and leadership.

Changing and escalating needs of children, families and communities require comprehensive approaches to education at all levels.

- Successful education of a child involves more than what occurs in a school; it cannot proceed without cooperation and collaboration among teachers, teacher associations, parents and guardians, and social services and health agencies.
- Schools should become more open to new ways of encouraging and supporting family involvement, and they should be more involved with community life.

Community colleges represent a unique and underutilized resource to strengthen elementary and secondary education and to enhance higher education opportunities for Southerners.

- The mission of community colleges is not clear among educators, policymakers, or the general public, nor have two-year institutions developed adequate bases of support.
- Community colleges are well-positioned to serve both traditional students and those who have reasons of geography, finances, or personal concerns to require convenience, flexibility and/or low-cost to expand their education.
- The value of community colleges to serving nontraditional students requires increased investment in campus-operated student services.

Developing and Testing New Ideas

Accountability — of systems, schools, institutions and people — is essential for achieving education improvement; assessment capabilities need to be developed and enhanced.

- Often we do not know what to measure. We do not know if we are measuring the wrong thing, if we are measuring the right thing in the wrong way, or if we are not measuring enough.
- Measurement devices need to be geared to broadening opportunity rather than excluding people.

We must experiment with the way schools and school systems are governed.

- Collaborative efforts and comprehensive planning by elementary, secondary and higher education leaders will enhance reform efforts.
- State education agencies need assistance in developing creative ways to support and implement new education reform efforts.
- Incentives should be provided to school systems which demonstrate willingness to change governance structures to meet identified student needs.

There is a continuing need to develop and dis-

seminate new knowledge about what works in education.

- Knowledge of effective educational practices, particularly for diverse populations, must be expanded quickly to respond to rapid demographic changes.
- In order to revitalize the current teacher cohort, we must find new ways to reach teachers with stimulating and professional programs in creative, responsive teaching.
- Models of effective interdisciplinary and interagency collaboration between education and other child-serving agencies must be developed, evaluated and disseminated.
- Policymakers, school leaders, and business persons need better access to potential solutions so they can make informed decisions about educational investments and support.

These findings of the various task forces reinforce one another and are consistent with the results of the BellSouth Foundation survey of its grantees. The themes which emerged from the issues analysis were repeated in the responses and recommendations for the foundation which came from grant recipients:

> Comprehensive approaches to children, which include the provision of early childhood and traditional education and social and health services, are required to respond to the growing needs of children.
>
> Collaboration and opportunities for professional contact between educators, policymakers, and other education constituencies are essential for the development and implementation of new ideas about education.
>
> Policy changes are necessary to improve teacher recruitment and retention and to reward good teaching.
>
> Changes in school governance that reward creativity will result in more responsiveness to the needs of students, greater job satisfaction for and interaction among teachers, and more innovative uses of technology.
>
> Improved methods of assessment are needed to determine progress toward our educational goals, to encourage professional development for teachers, and to inform citizens about educational successes and problems.
>
> Shared leadership on all levels of schooling is essential to create climates in education and the public and private sectors which will foster change and stimulate creativity and collaboration.
>
> The ability of schools to make changes that will serve students successfully depends ultimately on strong community involvement that generates financial and personal support of education.

The findings offer challenges and opportunities for many institutions: families, government at all levels, business, schools, colleges, universities and professional associations. They are particularly compelling for philanthropy as it seeks to be a catalyst for reform in education.

Refining the BellSouth Foundation Agenda

The extensive commitment and the outstanding collaborative efforts of the task forces and the advisory committee offer an enormous challenge to the BellSouth Foundation. Not only have they deepened our understanding of the complex relationships between education, economic and human service issues, but they have identified the threads that intertwine philanthropy into the solution to these problems. We see more clearly now than ever the responsibilities, as well as the opportunities, that we have to both lead and support education reform.

Obviously the BellSouth Foundation cannot support every program idea that was presented by the task forces to address specific parts of the educational problem. However, we can and will embrace the values and insights offered by the task forces and the advisory committee as we evaluate and interact with grant applicants. We will be mindful especially of the need to relate proposed grants to defined visions of teaching and learning.

The BellSouth Foundation will respond to our educational colleagues' challenge that business and philanthropy must keep education high on the public's agenda and that new ideas for policy and practice must be stimulated. In addition to grantmaking, the foundation will, where appropriate, serve as a convenor or facilitator to promote discussion on education issues by diverse segments of the public and private sectors. We also will be open to supporting research that will provide policymakers new insights into issues of education policy and practice. Following the practice of our first five years, we hope to expand our efforts to create and support networks of educators who share common specialities and commitments to education reform.

Grant guidelines for the BellSouth Foundation will be redefined. They will reflect the task forces' overwhelming interest in education as a lifelong learning process, by no longer segmenting elementary and secondary program interests from higher education program interests. Furthermore, the guidelines will recognize the importance of preschool development on later learning by including pre-kindergarten interests in grants related to education policy and planning. Community colleges now will have equal opportunity to submit proposals under the new BellSouth Foundation guidelines.

Three broad program areas will define the BellSouth Foundation's new priorities: SUPPORTING EDUCATORS TO MEET CHANGING STUDENT NEEDS, LINKING EDUCATION POLICY WITH CHANGING REGIONAL NEEDS, and EXPANDING THE ROLE OF INFORMATION TECHNOLOGIES IN EDUCATION. In combination, these programs focus on the student as the basis of decisions about education programs, but recognize that successful programs will be created and sustained only under appropriate policies. They also recognize that public and educational policies must be in response to the social, demographic, and economic realities of the region and the nation.

SUPPORTING EDUCATORS TO MEET CHANGING STUDENT NEEDS will encompass four strategies: New approaches to teacher education; creative teaching; leadership development; and comprehensive services. These strategies will focus on ways in which the traditional roles of educators can be redefined to enhance their ability, autonomy and leadership in meeting the needs of students. They will support efforts to attract, prepare, and retain new and diverse groups of people to the profession. Central to this program is the belief that the individuals in whom we entrust the education of students deserve considerable respect, recognition, and rewards.

This program also will expand the foundation's

vision of education to include responsibilities to respond to those needs of students that are prerequisite to academic learning. The foundation is convinced that schools alone, no matter how well organized and how dedicated their personnel, cannot address the profoundly changed conditions of students and their families. Work in this area will support education and human service collaborations that help to identify and serve the comprehensive needs of students.

LINKING EDUCATION POLICY WITH CHANGING REGIONAL NEEDS will respond to four strategies: Expanding the scope of public education; building community support for public education; strengthening educational governing bodies; and improving accountability and assessment of students, teachers, and systems. These strategies reflect the foundation's understanding that education is essentially a public responsibility that is defined by public policy and regulation.

Program grants and activities will support local, state, and regional efforts to discuss and test new ideas about public policy which will improve learning and enhance support for education. They will consider ways to develop the knowledge, leadership, and accountability required of elected officials. In addition, this program area will be concerned with new and effective ways to evaluate educational success that support the continued improvement of students, educators and educational practices.

The foundation's program, EXPANDING THE ROLE OF INFORMATION TECHNOLOGY IN EDUCATION, will continue its interest in the study of telecommunications, but it will now address the ability of higher education to promote technology usage in other disciplines. In addition, the foundation will support planning for and experimentation with information technologies to improve teaching and learning and to overcome inequities and isolation.

Three cross-cutting concerns will be central in the consideration of grants and program activities. These concerns reflect core values of the foundation's vision of education. They are:

DIVERSITY. Does the program value and respond to diversity among students, parents, educators, and the community?

TECHNOLOGY. Is technology used appropriately and effectively to enhance teaching and learning, and to link isolated people and institutions for educational opportunities?

COLLABORATIONS. Are the concerned constituencies and institutions involved sufficiently to produce effective, acceptable results and to build a commitment to the policy or program being addressed?

Conclusion

Efforts to improve education must be part of a dynamic of change. Philanthropy, to be an effective agent for change, must constantly evaluate its own need to change. Six years ago, in a speech to the Council on Foundations, James Joseph, President of the Council, spoke about the "transforming" nature of foundations—their ability to foster change and to respond to it. The BellSouth Foundation has devoted a year to exploring how it might change its program to meet changing needs in the South. As a result, the foundation will continue its educational purpose but will focus on new programs and activities.

Changing program and practice is easier than changing the surrounding environment—the complex web of public and private, individual and institutional relationships that comprise public education. Education reform is not a simple process and it requires long-term commitment. John Clendenin, in speaking about sustaining educational improvement, referred to the need for two contradictory notions to coexist—"a sense of urgency and a habit of patience."

The coexistence of these apparently contradictory concepts challenges us still. Efforts to improve education require a special kind of urgency, one which admits problems and is relentless in applying energies to solve them. We see the results of this sense of urgency in the expanded investments that have made the South a better place for many of its citizens. But the improvements are neither comprehensive nor inclusive enough for us to rest. Lasting and fulfilling education improvements will take time and patience is required.

Patience and endurance, like neighborliness, are particularly southern virtues. They are fueled not by resignation, but by hope that, if we continue our resolve, we will succeed. They combine with our commitment to community and caring to help us extend to the many, the successes we have achieved for the few.

We have the qualities and the commitment in the South to turn education in the region into a national strength. Let us expand our vision and our efforts to fulfill the promise of education reform.

Appendix A

Evaluation Questionnaire

Page One of the questionnaire consisted of the BellSouth Foundation's brief summary of the grant...this is the BellSouth Foundation's understanding of what the grant set out to do and/or what it accomplished.

Note: We realize that our grants have been made throughout a 3-year period and that, for many grantees, the project which we have funded is not yet completed. We ask, however, that you answer these questions in a manner which best reflects your current situation.

Background

1. Is the foregoing description of our grant to you correct? How would you change it?
2. What needs were you trying to address through the BellSouth grant?
3. What goals did you have?
4. Have these goals changed? How? Why?
5. Describe the outcomes. Are they different from your initial expectations?

Issues

6. What major educational policy issues were encompassed by our grant to you?
7. How have these issues changed since you began work under our grant?
8. Given these changes in the issues and assuming your continued interest in the program area which we funded, how would you now design and implement a program differently from the one which we funded?
9. What are the most important current trends affecting the issues which our grant to you addressed?

People

10. What was the target population? What were your plans about how our grant to you would affect these groups?
11. How have these effects differed from what you initially anticipated?
12. Did you plan to work with any other organizations in implementing the program? If so, which ones? Did you actually work with them?
13. Did you work with any other groups with whom you did not anticipate working? Which ones?
14. What were the effects on these groups of their involvement in the project?
15. Have new groups started as a result of this grant? If so, which ones? What do they do?

Funding

16. Did the BellSouth grant to you result in any additional funds from other sources? If so, which ones and how much money?
17. If you were now writing a similar proposal, how, if at all, would your suggested allocation of resources change?

Other

18. What new issues have resulted in part as a result of your work on our grant to you?
19. What recommendation, if any, do you have for us about how we should now treat the issues with which our grant to you dealt?

Appendix B

MEMBERS OF BELLSOUTH FOUNDATION TASK FORCES
1990 ISSUES STUDY

Improving Learning

Principal Investigator: Dr. Gerry House
Superintendent
Chapel Hill-Carrboro City Schools
Chapel Hill, North Carolina

Assisted by Dr. Sheila Cory
Director of Technology

Co-Investigators: Dr. Sharon Landesman Ramey
Co-Director
Civitan International Research Center
University of Alabama at Birmingham
Birmingham, Alabama

Dr. John H. Lounsbury
Professor and Dean Emeritus
School of Education
Georgia College
Milledgeville, Georgia

Dr. Asa G. Hilliard, III
Professor
Educational Foundations
Georgia State University
Atlanta, Georgia

Dr. A. Lin Goodwin
Assistant Professor
Teachers College, Columbia University
New York, New York

Mr. George B. Autry
President
MDC, Inc.
Chapel Hill, North Carolina

Improving Teaching

Principal Investigator: Dr. John B. Williams, III
Associate Professor
Graduate School of Education
Harvard University
Cambridge, Massachusetts

Co-Investigators: Mr. John Norton
Vice President
Information
Southern Regional Education Board
Atlanta, Georgia

Dr. Willis D. Hawley
Director
Institute for Public Policy Studies
Vanderbilt University
Nashville, Tennessee

Dr. Ellen Pechman
Co-Director
Center for Research in Mathematics and Science Education
North Carolina State University
Raleigh, North Carolina

Improving School Governance, Management & Organization

Principal Investigator: Dr. Terry K. Peterson
Executive Director
South Carolina Business-Education Committee of the Education Improvement Act
Columbia, South Carolina

Co-Investigators: Dr. Phillip C. Schlechty
President
The Center for Leadership in School Reform
Louisville, Kentucky

Mr. John N. Dornan
Executive Director
Public School Forum of
North Carolina
Raleigh, North Carolina

Dr. Frank A. Loda
Director
The Center for Early Adolescence
The University of North Carolina
at Chapel Hill
Carrboro, North Carolina

Improving Higher Education

Principal Investigator: Dr. Betty L. Siegel
President
Kennesaw College
Marietta, Georgia

Co-Investigators: Dr. Antoine M. Garibaldi
Vice President for
Academic Affairs
Xavier University of Louisiana
New Orleans, Louisiana

Dr. Ben Ladner
President
The National Faculty
Atlanta, Georgia

Dr. Robert C. Williams
Vice President
Academic Affairs
Davidson College
Davidson, North Carolina

The Uses of Technology in Education

Principal Investigator: Dr. James Okey
Professor
College of Education
The University of Georgia
Athens, Georgia

Co-Investigators: Mr. David Brittain
Director
Office of Educational Technology
Florida Department of Education
Tallahassee, Florida

Dr. George Uhlig
Dean
College of Education
University of South Alabama
Mobile, Alabama

Dr. Ted Hasselbring
Research Scientist
Mental Retardation Laboratory
Vanderbilt University
Nashville, Tennessee

Appendix C

TASK FORCE REPORTS TO THE
BELLSOUTH FOUNDATION

Task Force on Improving Learning

Improving Learning

Retooling the South's Community Colleges: The Role of Southern Philanthropy

Task Force on Improving Teaching

Improving Teaching in the South

Task Force on Improving School Governance, Management & Organization:

School Governance, Management and Organization: The Key Issues for Philanthropic Investments

Task Force on Improving Higher Education

Improving Higher Education in the 1990s

Task Force on the Uses of Technology in Education

Uses of Technology in Education

To obtain a copy of any report, please write to the BellSouth Foundation, 1155 Peachtree Street, N.E. Atlanta, GA 30367-6000

Appendix D

BELLSOUTH MANAGEMENT PANEL

Ms. Mylle H. Bell
Director-Corporate Planning and Budget
BellSouth Corporation
Atlanta, Georgia

Ms. Regina Cates
Manager-Customer Services
Southern Bell
Atlanta, Georgia

Ms. Devon S. Collins
Operations Manager-Marketing, Network and Planning
BellSouth Services
Atlanta, Georgia

Mr. S. Stan Dickson
Vice President-Kentucky
South Central Bell
Louisville, Kentucky

Ms. Patricia Donald
General Manager-Marketing
Southern Bell
Atlanta, Georgia

Mr. Jere A. Drummond
Executive Vice President-Marketing, Network and Planning
BellSouth Services
Atlanta, Georgia

Mr. Derry Harper
General Attorney
South Central Bell
Nashville, Tennessee

Mr. Roy B. Howard
Senior Vice President-Corporate Human Resources
BellSouth Corporation
Atlanta, Georgia

Mr. Larry L. Johnson
Assistant Vice President-Mississippi
South Central Bell
Jackson, Mississippi

Ms. Deborah F. Kaye
Staff Manager-Corporate Human Resources
BellSouth Corporation
Atlanta, Georgia

Mr. W. Court Lantaff
Assistant Vice President-Florida
Southern Bell
Miami, Florida

Mr. Earle Mauldin
Group President-Mobile Systems
BellSouth Enterprises, Inc.
Atlanta, Georgia

Ms. Bernice A. McGuire
Director-Corporate Planning
Southern Bell
Atlanta, Georgia

Mr. Henry E. Nelson
Staff Manager-Marketing
BellSouth Services
Birmingham, Alabama

Mr. Clarence O'Banner
Director-Public Relations
BellSouth Corporation
Atlanta, Georgia

Appendix E

ADVISORY COMMITTEE TO THE
BELLSOUTH FOUNDATION

Co-Chairmen

The Honorable Lamar Alexander
President
The University of Tennessee
Knoxville, Tennessee
Governor, Tennessee, 1979-87
U.S. Secretary of Education, 1991-

The Honorable Richard W. Riley
Nelson, Mullins, Riley & Scarborough
Columbia, South Carolina
Governor, South Carolina, 1979-87

Dr. W. Ray Cleere
Commissioner
Mississippi Institutions of Higher Learning
Jackson, Mississippi

Dr. Johnetta B. Cole
President
Spelman College
Atlanta, Georgia

Dr. Alton C. Crews
Director
Southern Regional Education Board
Atlanta, Georgia

Dr. Cleveland Hammonds
Superintendent
Birmingham Board of Education
Birmingham, Alabama

Ms. JoAnne James
Chairman
Forward in the Fifth
Berea, Kentucky

Dr. Eamon M. Kelly
President
Tulane University
New Orleans, Louisiana

Dr. Ruth G. Shaw
President
Central Piedmont Community College
Charlotte, North Carolina

Mr. Pat L. Tornillo, Jr.
Executive Vice President
United Teachers of Dade
Miami, Florida

References

The BellSouth Foundation extends special thanks to those who provided statistical information and projections for this report:

Joseph D. Creech, Southern Regional Education Board
Joseph L. Marks, Southern Regional Education Board
Thomas N. Schaap, Forecast and Budget Department, BellSouth Corporation

Specific sources and references include:

Betts, Doris. *Halfway Home & a Long Way to Go.* Raleigh: Southern Growth Policies Board, [1988].

Creech, Joseph D. *Educational Benchmarks 1990.* Atlanta: Southern Regional Education Board, [1990].

Creech, Joseph D. *Trends.* Atlanta: Southern Regional Education Board, [1990].

Kids Count Data Book: State Profiles of Child Well-Being. Washington, D.C.: The Center for the Study of Social Policy, [1991].

Marks, Joseph L. *Fact Book on Higher Education 1990.* Atlanta: Southern Regional Education Board, [1990].

A Nation At Risk. Washington, D.C.: United States Department of Education, [1983].

New York Times. 30 December 1990.

Olson, Stan, ed. *The Foundation Directory, 1991 Edition.* New York: The Foundation Center, 1991.

Results In Education. Washington, D.C.: National Governors Association, [1990].

SREB Annual Report 1990-91. Atlanta: Southern Regional Education Board [1991].

Statistical Abstract of the United States. Washington, D.C.: United States Department of Commerce, Bureau of Census, 1989, Tables 736 and 738.

United States Department of Commerce, Bureau of Economic Analysis, 1991.

BellSouth Foundation

Board of Trustees

F. Duane Ackerman, Chairman
R. L. (Mickey) McGuire
C. Richard Yarbrough

Officers

John J. Brooks, President
Charles W. Shewbridge, III, Vice President
Patrick H. Casey, Comptroller
Kincaid Patterson, Treasurer
Emily C. Sanders, Assistant Treasurer
Patricia L. Willis, Secretary

Staff

Patricia L. Willis, Executive Director
Leslie J. Graitcer, Program Manager
Wendy L. K. Best, Assistant Manager
Juliana Sweazea, Secretary

Guidelines for the BellSouth Foundation will be available October 1, 1991. Requests for guidelines and other correspondence may be addressed to:

BellSouth Foundation
1155 Peachtree Street, N.E.
Atlanta, GA 30367-6000

This report was printed entirely on recycled paper.

Design and production: Paul Fruck Design *Illustrations: Michael Parasiteva*
Printing: Color Graphics, Inc. *Typesetting: Craftsmen Type*